

# Advertising Age

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## LAST MINUTE NEWS

### Meigher mulls magazine start-up company

NEW YORK—S. Christopher Meigher III, outgoing president of Time Inc.'s New York magazine division, is considering starting a company to buy and launch magazines, people close to him said. The company would be modeled after Time Inc.'s entrepreneurial Time Publishing Ventures division, which Mr. Meigher headed in 1990 and '91. He wouldn't comment on his plans.

### Infiniti focusing on customer service

CARSON, Calif.—Infiniti is making customer service the theme of its summer campaign, starting on network and spot TV today. Two spots show the lengths to which the upscale car company will go to keep its customers happy, including delivering gasoline via helicopter to a car stranded in the desert. The spots mark the first work on the account by creative directors Dave Wecal and Dean Noble at Hill, Holliday, Connors, Cosmopolis, Marina del Rey.

### Founder Thomas exits Angotti shop

NEW YORK—Tom Thomas, a founder and exec VP-co-creative director at Angotti, Thomas, Hedge, resigned last week. Mr. Thomas, 49, and the agency said the departure was amicable and had been planned for months. He helped (Continued on Page 8)

## Perot talks to Riney about campaign ads

By Steven W. Colford

Hal Riney, the man who helped reelect President Reagan, is negotiating with Ross Perot to produce commercials for the Texas billionaire's apparent presidential campaign.

Mr. Riney, chairman-CEO of Hal Riney & Partners—along with Jim Travis, president of Riney's New York office, and Bruce Campbell, senior VP-creative director in San Francisco—accompanied Mr. Perot last week during public appearances in California and Colorado, where they filmed Mr. Perot speaking. They also filmed testimonials from supporters in the crowds.

### POLITICS

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relationship stemmed from a phone call Mr. Perot made a few weeks ago to Mr. Riney.

"Hal gets calls from a lot of people," the executive said, including the campaigns of President Bush and Democratic Gov. Bill Clinton. "All he has done is taken a phone call and pro-

vided a... freebie consultation" for Mr. Perot.

The executive denied Mr. Riney is negotiating with the Perot campaign for an official role in charge of advertising. But that was contradicted by others, including Gerald Rafshoon, the Washington-based filmmaker and adviser to the Perot campaign. Mr. Rafshoon, who was in charge of advertising for Jimmy Carter's 1976 presidential campaign, last Friday confirmed that serious discussions with Mr. Riney are ongoing.

"The campaign has been talking to him about doing its advertising," said Mr. Rafshoon, a close friend of Hamil- (Continued on Page 37)

## P&G tests new retail plan, cuts diaper price

Brand Development Fund aims for unified merchandising

By Bradley Johnson and Jennifer Lawrence

Procter & Gamble Co. next month will test the merger of all supermarket merchandising incentives into one megaprogram, called a Brand Development Fund, in a move that could repair retailer relations while boosting P&G's clout.

Also, the marketer for the first time is applying its new everyday low pricing policy to two "core" brands—Luvs and Pampers disposable diapers—and is looking into expanding it to all brands.

In an exclusive interview with *Advertising Age*, Exec VP Durk Jager, who heads P&G's U.S. operations and is spearheading what he calls the "value

pricing" strategy, said there are products in virtually every P&G business segment that have moved in the direction of value pricing.

"In principle, if you buy the philosophy and the

■ P&G wants to raise direct marketing profile—P. 2.  
■ Top-level P&G departures raise questions—P. 28.

thoughts behind [value pricing], it's appropriate for every brand," he said. "Now, the question is the degree you go to it and when you do it and so on."

Although P&G contends the Brand Development Fund (Continued on Page 28)



Exec VP Durk Jager is spearheading P&G's value pricing strategy, which is being expanded to such core brands as Pampers and Luvs.



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## Della Femina gone, so RSCG will merge some or all U.S. agencies

CEO Goudard: "Now we can build something strong"

By Melanie Wells

NEW YORK—Euro RSCG is expected to merge some and possibly all of its U.S. agency operations following the departure of Jerry Della Femina as chairman-CEO of the agency that bears his name.

In a move that wasn't unexpected, Mr. Della Femina announced last week that Paris-based Euro RSCG, which assumed ownership of Della Femina, McNamee in 1989, had agreed to buy out his employment contract and that he would resign.

Euro RSCG International CEO Jean-Michel Goudard said a deci-

sion on whether to merge Della Femina, McNamee with the French holding company's other U.S. shops was expected within four to six weeks.

Those agencies include Messner Vetere Berger Carey Schmetterer here and Tatham/RSCG, Chicago.

Combined, all three agencies reported 1991 billings of \$1.245 billion.

"We're going to investigate

what can be done," Mr. Goudard said at a news conference here. "If we go toward a merger, we want to make sure the people [involved] feel comfortable."

Mr. Goudard also said there are no plans to sell any of the agencies but indicated Mr. Della Femina's name might not remain on the door if the three shops are combined.

"We are three agencies, good agencies," he said. "Now we can build something strong out of what we have," Mr. Goudard said.

But it remained unclear what form a merger would take and (Continued on Page 8)

Della Femina

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# Western Int'l: Our plate is full in southern Calif.

By Cleveland Horton

Western International Media has decided it has enough agencies to work with in southern California and won't accept any more shops as clients.

The move is a blow for the many creative boutiques in the area, which see Los Angeles-based Western International as an equalizing force, allowing them to compete against major agencies for a large account.

"We had agencies calling us, agencies that we didn't buy for, asking, 'Can we say we use you?' in a pitch and 'If we win, we'll bring you the business,'" said Dennis Holt, president-ceo of the \$1 billion media buying service. Mr. Holt said the situation in Los Angeles and San Diego was "getting to be awkward," and he began feeling "disloyal" to his ex-

isting customers.

He added that Western International had refused to take on a \$20 million buying assignment

from an agency that didn't use the media service exclusively.

"Our feeling is that we want to work within the family," Mr. Holt said. "We look for relationships, not buying assignments."

He added, however, that he would continue to accept business from in-house agencies.

Some media buyers, however, suggest Western International may have hit a saturation point in southern California. As the largest buyer of spot TV in the na-

tion, Western International is estimated to control as much as 30% of the available spot time in Los Angeles.

One media buyer said the TV stations might object to increasing the amount of their inventory tied up in long-term, and thus less lucrative, deals if Western International had to buy more time.

The decision only affects southern California, Mr. Holt said, and Western International's other 25 offices will continue to bring in new agencies as clients.

Mr. Holt declined to say how many southern California agencies maintain ongoing relationships with his media buying service. Two years ago, he estimated that Western International worked with about 60 agencies nationally and derived about 60% of its total media billings from those customers. □



Holt

# Return of DDB 'guarantee'

## Berlin adds new twist to failed compensation plan

By Gary Levin

Andy Berlin is trying to resuscitate DDB Needham Worldwide's failed guaranteed-results incentive compensation plan.

Mr. Berlin, the new president of the agency's New York office, last week said he's discussing ways to revive the plan with several of the office's clients, including H.J. Heinz Co.'s Ore-Ida division, Hershey Foods Corp. and Tropicana Products.

The agency is also discussing the plan in its quest to win the creative portion of James River Corp.'s \$15 million account, now in review.

DDB Needham's original plan, which agency Chairman-CEO Keith Reinhard touted with a splashy news conference in 1990, called for the shop to be rewarded with a bonus if it exceeded sales or other goals set with its clients and to be penalized if those goals weren't met.

But it was largely based on a

standard commission system and required that the agency be given control over the "consistency of messages" not only in advertising but in sales promotion, public relations and direct marketing.

In a survey of all of DDB Needham's major U.S. clients a year after the plan was introduced, none said they signed up for it.

"Keith's program was a good idea," Mr. Berlin said. "The difficulty clients had ... had to do with the fact that he was asking for full integrated control." Clients, he added, didn't want to be "forced into one-stop shopping."

Mr. Berlin declined to specify how he'd structure a new guarantee plan, except to say there would be no set formula and any program would result from individual dis-

cussions with each client. One DDB Needham executive said Mr. Berlin plans to "raise the stakes" for both the agency and clients.

"You'd have to negotiate as if you were purchasing something or forming a joint venture, and construct a financial relationship that puts the agency and client together with a common business interest," he said.

In a speech at the Magazine Publishers Association Kelly Awards last month, Mr. Berlin said one method might be a pay-per-inquiry for ads that included a toll-free number or other response mechanism.

Mr. Berlin said the clients he's talked with so far have been "extremely interested and open-minded," but none have committed to the program.

Still, he believes "commission is dead. DDB Needham is going to be a pioneer in replacing the commission system with one based on results, risk and a common business interest with clients." □



Berlin

# Jaguar trims review to 5 agencies; O&M's Beers said to be involved

By John P. Cortez and Melanie Wells

Jaguar Cars has narrowed the review of its \$15 million to \$20 million account to five finalists, including Geer, DuBois, the New York-based incumbent, and Ogilvy & Mather, an agency for Jaguar parent Ford Motor Co.

Other agencies still in the running for Jaguar are Carmichael Lynch, Minneapolis; and McCaffrey & McCall and Margeotes Fertitta & Weiss, both New York.

Agencies believed to have been eliminated from the race are Bloom FCA and Deutsch, both New York; W.B. Doner & Co., Southfield, Mich.; Martin/Williams, Minneapolis; as well as Ford agencies Wells Rich Greene BDDP and Weiss, Whitten, Carroll, Stagliano, both New York; and J. Walter Thompson USA and Young & Rubicam, both Detroit.

One agency executive said Don Cook, Ford executive director-marketing staff, has been "indirectly involved" in the review. The same executive said Jaguar U.S. officials were trying to maintain control

of the process.

Charlotte Beers, new chairman-ceo at Ogilvy & Mather and a Jaguar driver, is said to be personally driving the pitch for the Jaguar account. O&M, Dearborn, Mich., already has the parts and service account for Ford, which acquired Jaguar for \$2.5

# Charlotte Beers, a Jaguar driver, is said to be personally driving the pitch for the Jaguar account.

billion in 1989.

A final decision is expected by early August, following a two-week question period and a 30-day strategic evaluation of the agency pitches by Jaguar officials and consultant Neal Gilliat. □

Contributing to this story: Gary Levin, Scott Hume and Bob Geiger.

By Kenneth Wylie

**T**he hobbling effects of both recession and debt reined in the U.S. research business, while overseas, the track was notably faster.

U.S. revenues rose 6.8% to \$2.06 billion in making good last year's forecast that research businesses would face stormy times in 1991. In real terms, inflation knocked off four of those percentage-point gains. Growth measured 8.2% in last year's report.

The ranking, the largest participation by the industry in the annual *Advertising Age* survey, included 84 research companies that encompass the full range of operations, from marketing, media and public opinion to politics.

Twenty-two had negative growth and 13 others grew less than 4% or not at all.

The international contribution to revenues at research companies rose to \$1.25 billion, up 10.8% (see related story on Page S-4), bringing worldwide totals for surveyed companies to \$3.34 billion, up 8.1%.

Heading the U.S. ranking once again was A.C. Nielsen Co. with research revenues up 9.3% to \$492 million, an *Ad Age* estimate. Arbitron Co. placed second at \$201.7 million.

#### IRI soars into third

Information Resources Inc. replaced IMS International in the third slot, advancing 29.1% in revenue to IMS' 6.5% gain. That gave IRI, at \$183.9 million, a nearly \$19 million lead over IMS, No. 4.

One of the largest companies to slip in U.S. revenues was No. 7 M/A/R/C Group, down 1.4% to \$56.1 million. Chairman-CEO Cecil B. Phillips believes debt servicing rather than poor financial returns, largely recession-influenced, has affected spending.

"When so many companies have severe debt, they just don't want to spend money on research," Mr. Phillips says.

MRB Group, ranked No. 12, dropped 8.5% to \$37.3 million in U.S. revenue, caused according to CEO Tim Bowles by clients who no longer are willing to pay for standard surveying.

#### Nielsen reigns worldwide

Nielsen, a Dun & Bradstreet Corp. unit, outpaced all research companies abroad with \$708 million, up 8.8%, for a worldwide total of \$1.2 billion. Such a mass—36% of the report's worldwide total—approaches research hegemony for the marketing and media research giant.

Ranking second in international revenues is IMS, Nielsen's sister company at Dun & Bradstreet. Based

# Dollars grow tight in U.S., but foreign research blossoms

## Domestic revenues hit \$2 billion, but 35 researchers can't keep up with inflation

in Cham, Switzerland, IMS grew 18.6% abroad to an estimated \$344 million.

#### Most show foreign gains

Of the 26 companies with international revenue, only three reported

services in Europe," reports Gian M. Fulgoni, IRI chairman-ceo, "and our success in the U.S. leads us to be optimistic about what we can do in Europe."

The fifth-ranked company in U.S. revenue, Westat, grew 16.6% to \$86.9

that is gained through sponsorship of a special event or athlete. The other identifies the cost per impression on national TV."

No. 71 Hughes Research Group jumped 38.3% to \$1.8 million despite mercurial swings in client demand through the year from labor intensive, more costly qualitative studies to less profitable quantitative studies.

Hughes' newest offering is a customized one-on-one interview technique called Motiv, which is attracting a lot more business, says VP Mary Lou Hadley. Hughes has just expanded into larger offices.

A broader systems approach, brought on by a corporate reorganization (including the departure of the founder), helped push 1991 revenue for No. 34 Vanderveer Group 38% higher to \$9.3 million, making it the third highest in growth.

Sales help is behind growth at No. 76 Efficient Market Services, formed just a year ago by former IRI and Nielsen personnel.

President Michael J. Spindler says there was a need for tactical data for the retailer in selling goods and for the manufacturer in making and shipping goods.

The company developed a tactical newswire connecting to PCs for just-in-time delivery. Fresh unit sales data are fed into the computer system daily.

"We do this non-intrusively, fitting our alerts into the daily flow on the PC screen," says Mr. Spindler.

Biggest revenue percentage decline in the survey was No. 81 Research & Forecasts, down 38.5% to \$705,141.

"We did more research studies," reports Chairman Nicholas J. Tortorello, "but it was the less costly focus groups and mail surveys."

The non-election year affected No. 37 Wirthlin Group, down 23.2% to \$9 million. The company provides research in politics, in addition to marketing, public affairs and communications.

Already 1992 is "ahead of plan," a reflection of the general election and recovery in the economy, says James Granger, president-chief operating officer at Wirthlin.

#### Advertiser is top client

Where are researchers getting their clients? What kinds of clients are paying the research companies?

The survey respondents say about 80% of their revenues come from advertiser research departments.

The rest comes from ad agency research units (5%), media (about 3%), advertiser account services (1.6%) and agency media and account-services departments and advertiser media departments, both less than

(Continued on Page S-4)

# TOP 10 RESEARCH COMPANIES

- 1 A.C. Nielsen
- 2 Arbitron
- 3 Information Resources Inc.
- 4 IMS International
- 5 Westat
- 6 Maritz Marketing Research
- 7 M/A/R/C Group
- 8 Abt Associates
- 9 NFO Research
- 10 Gallup Organization

■ Complete list of top research companies ranked by U.S. research revenues. Page S-2.

that revenue was down on a year-to-year basis. IRI, ranked No. 6 on the international side, dipped 2.1% in non-U.S. returns, a decline minimized by a 29.1% growth in its domestic business.

IRI's fast-growing business got \$65.8 million, nearly a third of its \$207.7 worldwide total, from its Software Products Group, which provides the technology that drives its Information Services Group, the application side.

Information Services, accounting for the rest of revenues, comprises InfoScan, a store scanner-generated data system that produced 58% of IRI's revenue, and BehaviorScan, an in-store testing system, which added another 10%.

International operations, mostly in Europe, now contribute about 11.5% of IRI's research revenue.

"Clients are clamoring for scanner

million. Its growth came from new research programs that go beyond the passive people meter by connecting TV commercials with home purchases.

#### Sports sponsorships measured

Growth leader in the ranking was No. 73 Joyce Julius & Associates, up 52.9% to \$1.3 million.

"We were successful in offering two new proprietary products," says Chairman Robert J. Cotman: "One measures the amount of exposure

# Top research companies by U.S. research revenues

| Rank | 1991 | 1990 | Company, headquarters                                | Gross U.S. research revenues |         |       | Total research revenues |       | U.S. offices | U.S. Full-time employees | Top executive                               | Telephone      |
|------|------|------|------------------------------------------------------|------------------------------|---------|-------|-------------------------|-------|--------------|--------------------------|---------------------------------------------|----------------|
|      |      |      |                                                      | 1991                         | 1990    | % chg | 1991                    | % chg |              |                          |                                             |                |
| 1    | 1    |      | A.C. Nielsen Co., Northbrook, Ill. *                 | \$492.0                      | \$450.0 | 9.3%  | \$1,200.0               | 9.0%  | 40           | NA                       | John C. Holt, chmn                          | (708) 498-6300 |
| 2    | NA   |      | Arbitron Co., New York                               | 201.7                        | 230.6   | NA    | 201.7                   | NA    | 8            | 1,358                    | A.J. Aurichio, president                    | (212) 887-1300 |
| 3    | 3    |      | Information Resources Inc., Chicago                  | 183.9                        | 142.4   | 29.1  | 207.7                   | 24.6  | 7            | 2,231                    | Gian M. Fulgoni, chmn-ceo                   | (312) 726-1221 |
| 4    | 2    |      | IMS International, Cham, Switzerland *               | 165.0                        | 155.0   | 6.5   | 509.0                   | 14.4  | NA           | NA                       | Serge Okun, president                       | 41-42-362244   |
| 5    | 4    |      | Westat, Rockville, Md.                               | 86.9                         | 74.5    | 16.6  | 86.9                    | 16.6  | 5            | 702                      | Joseph Hunt, president                      | (301) 251-1500 |
| 6    | 6    |      | Maritz Marketing Research, Fenton, Mo.               | 59.6                         | 54.1    | 10.2  | 59.6                    | 10.2  | 50           | 540                      | William H. Lewellen, president              | (314) 827-4000 |
| 7    | 5    |      | M/A/R/C Group, Las Colinas, Texas                    | 56.1                         | 56.9    | -1.4  | 56.1                    | -1.4  | 10           | 500                      | Cecil B. Phillips, chmn-ceo                 | (214) 506-3400 |
| 8    | 8    |      | Abt Associates, Cambridge, Mass.                     | 55.3                         | 43.4    | 27.5  | 55.3                    | 27.5  | 4            | 393                      | Walter R. Stellwagen, president-ceo         | (617) 492-7100 |
| 9    | 7    |      | NFO Research, Greenwich, Conn.                       | 45.6                         | 46.4    | -1.7  | 45.6                    | -1.7  | 10           | 350                      | William E. Lipner, president-ceo            | (203) 629-8888 |
| 10   | NA   |      | Gallup Organization, Princeton, N.J. *               | 43.5                         | 40.5    | NA    | 48.0                    | NA    | 12           | 450                      | Jim Clifton, ceo                            | (402) 489-8700 |
| 11   | 10   |      | Market Facts, Arlington Heights, Ill.                | 40.7                         | 40.2    | 1.2   | 40.7                    | 1.2   | 5            | 520                      | Verne B. Churchill, chmn-ceo                | (708) 590-7000 |
| 12   | 9    |      | MRB Group, London                                    | 37.3                         | 40.8    | -8.5  | 96.4                    | 2.2   | 3            | 456                      | Tim Bowles, ceo                             | 44-81-579-5550 |
| 13   | 11   |      | Walker Group, Indianapolis                           | 30.9                         | 28.8    | 7.3   | 32.5                    | 9.7   | 6            | 361                      | Frank D. Walker, chmn-ceo                   | (317) 843-3939 |
| 14   | 12   |      | Intersearch, Horsham, Pa.                            | 28.2                         | 25.1    | 12.4  | 28.2                    | 12.4  | 7            | 185                      | Alan Widra, president                       | (215) 657-6400 |
| 15   | 13   |      | Burke Marketing Research, Cincinnati                 | 24.9                         | 24.8    | 0.3   | 25.5                    | 1.2   | 9            | 230                      | Ronald L. Tatham, president-ceo             | (513) 241-5663 |
| 16   | 15   |      | Chilton Research Services, Radnor, Pa.               | 23.5                         | 22.6    | 4.0   | 23.5                    | 4.0   | 4            | 191                      | Marjorie Michitti, vp-general manager       | (215) 964-4602 |
| 17   | 19   |      | BASES Group, Covington, Ky.                          | 21.7                         | 18.7    | 16.0  | 22.7                    | 15.8  | 5            | 165                      | Jack E. Brown, chmn-ceo                     | (606) 655-6000 |
| 18   | 14   |      | Eirick & Lavidge, Atlanta                            | 21.4                         | 22.8    | -6.2  | 21.4                    | -6.2  | 4            | 155                      | John Rougeou, president                     | (404) 621-7607 |
| 19   | 17   |      | Research International, London                       | 21.2                         | 19.9    | 6.5   | 123.5                   | 2.4   | 3            | 153                      | Philip Barnard, chmn-ceo                    | 44-71-235-1588 |
| 20   | 20   |      | Millward Brown, Naperville, Ill.                     | 19.7                         | 17.6    | 11.9  | 60.0                    | 13.2  | 3            | 200                      | Robert D. Meyers, president-ceo             | (708) 505-0066 |
| 21   | 16   |      | Starch INRA Hooper, Mamaroneck, N.Y.                 | 19.6                         | 21.4    | -8.5  | 21.1                    | -7.1  | 2            | 190                      | William J. Wilson, president-ceo            | (914) 698-0800 |
| 22   | 23   |      | J.D. Power & Associates, Agoura Hills, Calif.        | 18.0                         | 13.9    | 29.8  | 18.0                    | 29.8  | 3            | 114                      | J. David Power III, president               | (818) 889-6330 |
| 23   | 18   |      | ASI Marketing Research, New York                     | 17.0                         | 19.4    | -12.4 | 17.0                    | -12.4 | 3            | 134                      | Gerald Lukeman, chmn-ceo                    | (212) 807-9393 |
| 24   | 21   |      | Mediamark Research, New York                         | 16.8                         | 16.3    | 3.2   | 16.9                    | 3.2   | 4            | 56                       | Alain J. Tessier, chmn                      | (212) 599-0444 |
| 25   | 25   |      | Harte-Hanks Marketing Services, River Edge, N.J.     | 15.1                         | 13.3    | 13.5  | 17.1                    | 11.8  | 2            | 170                      | Tom Swithenbank, president                  | (201) 342-6400 |
| 26   | 22   |      | Creative & Response Research Services, Chicago       | 15.1                         | 14.6    | 3.2   | 15.1                    | 3.2   | 9            | 130                      | Saul Ben-Zeev, chmn-ceo                     | (312) 828-9200 |
| 27   | 24   |      | Custom Research, Minneapolis                         | 14.9                         | 13.4    | 11.2  | 14.9                    | 11.2  | 4            | 81                       | Judith S. Corson, Jeffrey L. Pope, partners | (612) 542-0800 |
| 28   | 26   |      | National Analysts, Philadelphia                      | 13.3                         | 13.2    | 0.4   | 13.5                    | 1.1   | 1            | 72                       | John A. Berrigan, president                 | (215) 496-6800 |
| 29   | 27   |      | Data Development, New York                           | 13.1                         | 12.0    | 9.2   | 13.1                    | 9.2   | 1            | 85                       | Jerry Rosenkranz, chmn                      | (212) 633-1100 |
| 30   | 28   |      | Decision Research, Lexington, Mass.                  | 13.0                         | 12.0    | 8.5   | 14.0                    | 8.5   | 3            | 75                       | Eric L. Almquist, vp-general manager        | (617) 861-7350 |
| 31   | 30   |      | Total Research, Princeton, N.J.                      | 12.2                         | 10.5    | 16.3  | 12.2                    | 16.3  | 2            | 130                      | Lorin Zissman, president-ceo                | (609) 921-8100 |
| 32   | 31   |      | Lieberman Research West, Los Angeles                 | 10.8                         | 10.2    | 5.9   | 10.8                    | 5.9   | 1            | 75                       | Arnold Fishman, chmn                        | (310) 553-0550 |
| 33   | 32   |      | Conway/Milliken & Associates, Chicago                | 10.0                         | 9.2     | 8.5   | 10.0                    | 8.5   | 1            | 64                       | Foy N. Conway, ceo                          | (312) 787-4060 |
| 34   | 41   |      | Vanderveer Group, Fort Washington, Pa.               | 9.3                          | 6.7     | 38.0  | 9.3                     | 38.0  | 1            | 69                       | Marc Julius, president-mkt rsch/consulting  | (215) 646-7200 |
| 35   | 36   |      | Guideline Research, New York                         | 9.2                          | 8.0     | 15.0  | 9.2                     | 15.0  | 2            | 60                       | Norman Passman, chmn                        | (212) 947-5140 |
| 36   | 33   |      | Louis Harris & Associates, New York                  | 9.1                          | 8.7     | 4.8   | 22.8                    | 4.6   | 1            | 75                       | Humphrey Taylor, president-ceo              | (212) 698-9600 |
| 37   | 29   |      | Wirthlin Group, McLean, Va.                          | 9.0                          | 11.7    | -23.2 | 9.9                     | -22.9 | 6            | 71                       | Richard B. Wirthlin, chmn-ceo               | (703) 556-0001 |
| 38   | 34   |      | Response Analysis, Princeton, N.J.                   | 8.8                          | 8.5     | 4.0   | 8.8                     | 4.0   | 1            | 76                       | James H. Fouss, president-ceo               | (609) 921-3333 |
| 39   | 35   |      | ICR Survey Research Group, Media, Pa.                | 8.6                          | 8.4     | 1.4   | 8.6                     | 1.4   | 1            | 72                       | Fred Soulas, president                      | (215) 565-9280 |
| 40   | 38   |      | McCollum Spielman Worldwide, Great Neck, N.Y.        | 8.4                          | 7.5     | 12.0  | 8.4                     | 12.0  | 1            | 62                       | Harold Spielman, ceo                        | (516) 482-0310 |
| 41   | 42   |      | Field Research, San Francisco                        | 8.3                          | 6.7     | 24.6  | 8.3                     | 24.6  | 3            | 65                       | Aaron Levy, president                       | (415) 392-5763 |
| 42   | 37   |      | Newman-Steln, New York                               | 8.0                          | 7.9     | 1.3   | 8.0                     | 1.3   | 2            | 50                       | Lawrence Newman, president                  | (212) 777-2700 |
| 43   | 50   |      | Market Measures, Livingston, N.J.                    | 7.7                          | 5.7     | 35.1  | 7.7                     | 35.1  | 1            | 58                       | Bernard E. Koff, president                  | (201) 716-0500 |
| 44   | 49   |      | Marketing Analysts, Rockville Centre, N.Y.           | 7.0                          | 5.7     | 21.7  | 7.1                     | 21.6  | 1            | 32                       | Robert Pascale, president                   | (516) 766-4224 |
| 45   | 47   |      | Pretesting Co., Tenafly, N.J.                        | 6.6                          | 5.8     | 14.1  | 7.1                     | 12.6  | 2            | 32                       | Vivian Edelberg, president                  | (201) 569-4800 |
| 46   | 44   |      | Markteam/Doane Marketing Research, St. Louis         | 6.5                          | 6.3     | 3.5   | 6.5                     | 3.5   | 2            | 70                       | Carl E. Block, president                    | (314) 878-7707 |
| 47   | 43   |      | FRC Research, New York                               | 6.4                          | 6.5     | -1.3  | 6.4                     | -1.3  | 1            | 33                       | R. Theeman, P. Knable, exec vps             | (212) 696-0870 |
| 48   | 40   |      | Shifrin Research, New York                           | 6.3                          | 6.9     | -8.7  | 6.3                     | -8.7  | 1            | 25                       | Leslie Shifrin, president                   | (212) 473-4050 |
| 49   | 46   |      | Strategy Research, Miami                             | 6.0                          | 6.1     | -1.6  | 6.0                     | -1.6  | 2            | 50                       | Richard W. Tobin, president                 | (305) 649-5400 |
| 50   | 39   |      | Directions for Decisions, New York                   | 5.6                          | 7.0     | -20.0 | 5.6                     | -20.0 | 1            | 36                       | Joseph F. Baldi Jr., chmn                   | (212) 683-9595 |
| 51   | 51   |      | Ross-Cooper-Lund, Teaneck, N.J.                      | 5.4                          | 5.2     | 3.9   | 5.4                     | 3.9   | 1            | 34                       | David Ross, president                       | (201) 836-0040 |
| 52   | 48   |      | AHF Marketing Research, New York                     | 5.2                          | 5.8     | -9.5  | 5.2                     | -9.5  | 1            | 56                       | Beryl L. Levitt, president                  | (212) 941-5555 |
| 53   | 45   |      | Kapuler Marketing Research, Arlington Heights, Ill.  | 5.1                          | 6.2     | -17.7 | 5.1                     | -17.7 | 1            | 32                       | Stanley Kapuler, president                  | (708) 870-6700 |
| 54   | 55   |      | Schulman, Ronca & Bucuvalas, New York                | 5.0                          | 3.9     | 28.5  | 5.0                     | 28.5  | 2            | 45                       | Mark Schulman, president                    | (212) 481-6200 |
| 55   | 53   |      | Savitz Research Center, Dallas                       | 4.8                          | 4.0     | 20.0  | 4.8                     | 20.0  | 3            | 30                       | Jeffrey N. Savitz, president                | (214) 386-4050 |
| 56   | 56   |      | Bruno & Ridgway Research Associates, Princeton, N.J. | 4.7                          | 3.5     | 32.4  | 4.7                     | 32.4  | 6            | 32                       | A. Spencer Bruno, chmn                      | (609) 452-8282 |
| 57   | 52   |      | Brown Koff & Fried, New York                         | 4.6                          | 4.8     | -4.2  | 4.6                     | -4.2  | 1            | 28                       | M. Brown, A. Koff, R. Fried, partners       | (212) 206-0700 |
| 58   | 53   |      | Oxtoby-Smith, New York                               | 4.0                          | 4.0     | 0.0   | 4.0                     | 0.0   | 1            | 39                       | Joseph G. Smith, chmn                       | (212) 614-0040 |
| 59   | 60   |      | Shugoll Research, Bethesda, Md.                      | 3.1                          | 2.8     | 10.5  | 3.1                     | 10.5  | 3            | 18                       | Joan Shugoll, president                     | (301) 656-0310 |
| 60   | 58   |      | Kennedy Research, Grand Rapids, Mich.                | 3.0                          | 3.0     | 0.0   | 3.0                     | 0.0   | 1            | 30                       | Richard D. Kennedy, president               | (616) 458-1461 |
| 61   | 61   |      | Market Development, San Diego                        | 2.9                          | 2.6     | 11.5  | 2.9                     | 11.5  | 1            | 20                       | Loretta H. Adams, president                 | (619) 232-5628 |
| 62   | 57   |      | Rothstein-Tauber, Stamford, Conn.                    | 2.8                          | 3.2     | -11.6 | 3.2                     | -6.7  | 1            | 16                       | Melvin Rothstein, chmn                      | (203) 324-2420 |
| 63   | 58   |      | Mid-America Research, Mt. Prospect, Ill.             | 2.8                          | 3.0     | -6.7  | 2.8                     | -6.7  | 6            | 24                       | Marshall Ottenfeld, president               | (708) 392-0800 |
| 64   | 67   |      | Myers Reports, Parsippany, N.J.                      | 2.5                          | 1.9     | 33.2  | 2.5                     | 33.2  | 1            | 11                       | Jack Myers, president                       | (201) 808-7333 |
| 65   | 62   |      | deKadt Marketing & Research, Greenwich, Conn.        | 2.4                          | 2.3     | 4.2   | 2.4                     | 4.2   | 1            | 18                       | Pieter P. de Kadt, president                | (203) 661-1161 |
| 66   | 64   |      | Heller Research Group, Port Washington, N.Y.         | 2.3                          | 2.0     | 15.6  | 2.4                     | 17.1  | 1            | 18                       | Harry E. Heller, ceo                        | (516) 883-4521 |
| 67   | 68   |      | Norman Hecht Research, Syosset, N.Y.                 | 2.0                          | 1.9     | 8.3   | 2.0                     | 8.3   | 1            | 13                       | Norman Hecht, president                     | (516) 496-8866 |
| 68   | 65   |      | Booth Research Services, Atlanta                     | 2.0                          | 2.0     | 1.4   | 2.0                     | 1.4   | 1            | 14                       | Peter E. Booth, president                   | (404) 992-2200 |
| 69   | 63   |      | JRP Marketing Research Services, Media, Pa.          | 2.0                          | 2.1     | -4.8  | 2.0                     | -4.8  | 1            | 25                       | Paul Frattaroli, president                  | (215) 565-8840 |
| 70   | 66   |      | SMS Research & Marketing Services, Honolulu          | 1.9                          | 2.0     | -1.6  | 1.9                     | -1.6  | 1            | 21                       | Hersh Singer, president                     | (808) 536-5200 |
| 71   | 69   |      | Hughes Research, Rockville, Md.                      | 1.8                          | 1.3     | 38.3  | 1.8                     | 38.3  | 1            | 5                        | Thomas B. Hughes, president                 | (301) 670-0005 |
| 72   | 72   |      | Target Research Group, Pearl River, N.Y.             | 1.5                          | 1.1     | 32.7  | 1.5                     | 32.7  | 1            | 3                        | Ronald Silver, president                    | (914) 620-0077 |
| 73   | 74   |      | Joyce Julius & Associates, Ann Arbor, Mich.          | 1.3                          | 0.9     | 52.9  | 1.3                     | 52.9  | 5            | 23                       | Robert J. Cotman, chmn                      | (313) 971-1900 |
| 74   | 75   |      | Kreitman & Jones, Long Beach, N.Y.                   | 1.2                          | 0.8     | 50.0  | 1.2                     | 50.0  | 1            | 8                        | E. Kreitman, B. Jones, principals           | (516) 897-7063 |
| 75   | 73   |      | Davidson-Peterson Associates, York, Maine            | 1.1                          | 0.9     | 19.5  | 1.1                     | 19.5  | 1            | 13                       | Thomas Lea Davidson, ceo                    | (207) 363-7347 |
| 76   | 82   |      | Efficient Market Services, Northbrook, Ill.          | 1.0                          | 0.0     | NA    | 1.0                     | NA    | 2            | 23                       | Michael J. Spindler, president              | (708) 205-7800 |
| 77   | 70   |      | Americae LIVES, San Francisco                        | 1.0                          | 1.2     | -19.6 | 1.0                     | -16.7 | 1            | 7                        | Glen Barnard, chmn                          | (415) 921-1946 |
| 78   | 77   |      | BRX/Global, Rochester, N.Y.                          | 0.9                          | 0.7     | 28.6  | 1.8                     | 63.6  | 3            | 9                        | Joel Axelrod, president                     | (716) 442-0590 |
| 79   | 76   |      | Miller Research Group, Little Rock, Ark.             | 0.8                          | 0.7     | 13.3  | 0.8                     | 13.3  | 1            | 7                        | David F. Miller, president                  | (501) 221-3303 |
| 80   | 79   |      | Marketing Metrics, Paramus, N.J.                     | 0.8                          | 0.6     | 25.0  | 0.9                     | 41.7  | 1            | 13                       | Terry Vavra, president                      | (201) 599-0790 |
| 81   | 71   |      | Research & Forecasts, New York                       | 0.7                          | 1.1     | -38.5 | 0.7                     | -37.4 | 1            | 3                        | Nicholas J. Tortorello, chmn                | (212) 593-6424 |
| 82   | 78   |      | Northstar Research Associates, New York              | 0.5                          | 0.7     | -33.4 | 0.5                     | -33.4 | 1            | 2                        | Martin D. Yazmir, president                 | (212) 594-1117 |
| 83   | 80   |      | Hamlin Harkins, San Jose, Calif.                     | 0.4                          | 0.4     | 11.1  | 0.5                     | 8.7   | 2            | 6                        | C. Harkins, D. Hamlin, principals           | (408) 298-0313 |
| 84   | 81   |      | Marketing Advantage, Stamford, Conn.                 | 0.4                          | 0.2     | 58.3  | 0.4                     | 58.3  | 1            | 6                        | John W. Keon, president-ceo                 | (203) 323-6323 |

Notes: Dollars are in millions. \* indicates figures are AA estimates. 1990 figures not adjusted for 1991 acquisitions. 1990 figures not adjusted for 1991 divestitures. Source: AA survey.

AA chart: Kathy Welski

# Plenty of room in Europe, 'ripe' Asia

Dun & Bradstreet dominates international, but others can maneuver for growth

By R. Craig Endicott

**T**he research business knows no national boundaries, evidenced by two recent polls from the same research company.

Ross Perot was shown leading Bill Clinton in the U.S. presidential race (the first poll to show the third-party candidate leading a major party candidate), and in the U.K., an unexpected Tory victory was accurately proclaimed in an election-night exit poll.

Both were the product of Louis Harris & Associates, a name as American as apple pie and as British as steak and kidney pie.

Harris is part of the surge in the industry's non-U.S. growth, which in 1991 reached \$1.3 billion among 26 companies with international returns monitored in this *Advertising Age* report.

That volume produced a year-to-year gain of 10.8%, outstripping the 6.4% advance in domestic revenues.

International returns from the nearly one-third of the companies surveyed by *Ad Age* accounted for 38.8% of the \$3.4 billion in worldwide revenues from 84 companies, up from 37.9% in 1990.

A.C. Nielsen Co. and IMS International, two Dun & Bradstreet Corp. units, held down the top two spots, respectively; in fact, they claimed 81% of all international returns. Nielsen captured the top spot with revenues of \$708 million, up 8.8%, and IMS ranked No. 2 at \$344 million, up 18.6%.

IMS draws about 68% of its worldwide total from abroad, and Nielsen 59%.

The well of international-generated dollars actually runs deeper among the 84 than shown, because many count foreign licensing agreements as business generated from the U.S.

McCollum Spielman Worldwide, for example, draws \$3.9 million in such fees from 24 countries. All are attributed to its U.S. office.

Even though international volume showed stronger growth than the U.S. component, that volume was held in check by returns from two research-minded countries: recession-locked Britain, and France, where the franc depreciated against the dollar. Revenue growth was only 3.9% for the 15 companies reporting revenues from the European Community.

The EC is the focus of most of the non-U.S. research dollars. The 15 companies reporting EC activity generated \$145.7 million from there.

Research International, London, reported 72%, or \$88.9 million of its non-U.S. business, coming from the Common Market—the highest volume from Europe for those reporting a geographic breakout of revenues.

Nielsen and IMS probably had higher totals from Eu-

rope but didn't provide a geographic breakout.

Nielsen, for example, runs extensive scanning operations in the U.K., France, West Germany, Belgium, the Netherlands, Austria, Italy and Finland. In 1991, it acquired three companies spe-

cializing in consumer-panel research in Europe: CRA in Italy, AIM Research A/S in Denmark and Centrum voor Marketing Analyses in the Netherlands.

MRB Group, London, drew 40% of its total revenue, or \$38.6 million, from the EC in 1991 and expects growth there to rise to 42% of its total this year.

At Harris, 55%, or \$12.5 million in revenues, were from the EC. But growth was minimal because Harris' European operations are tied to the U.K. and France, and its

volume is heaviest in consumer and advertising research which ties it more closely to the business climate than political polling. (Harris, nonetheless, has handled all polling for the Tory Party in Britain for the last 26 years.)

Harris is expected to expand rapidly in the next two years in Europe with the addition of two new offices, called "franchise" operations by Humphrey Taylor, president-ceo.

"The level of sophistication is as great now in Europe as in the U.S.," says Peter Klein, president of McCollum Spielman. He and others also point to Asia.

Asian operations generated \$14.7 million, the second highest regional total, from 10 companies, up 88% for those reporting revenues for both years.

The market there is ripe, says Mr. Klein, "because of the high degree of training among practitioners and the dearth of market research." □

"The level of sophistication is as great now in Europe as in the U.S."

cializing in consumer-panel research in Europe: CRA in Italy, AIM Research A/S in Denmark and Centrum voor Marketing Analyses in the Netherlands.

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## Research companies by international revenue

| Rank | 1991 | 1990 | Company                        | Int'l research revenue |           |       | Int'l % of total research |       |
|------|------|------|--------------------------------|------------------------|-----------|-------|---------------------------|-------|
|      |      |      |                                | 1991                   | 1990      | % chg | 1991                      | 1990  |
| 1    | 1    | 1    | A.C. Nielsen Co. *             | \$708,000              | \$650,900 | 8.8%  | 59.0%                     | 59.1% |
| 2    | 2    | 2    | IMS International *            | 344,000                | 290,000   | 18.6  | 67.6                      | 65.2  |
| 3    | 3    | 3    | Research International         | 102,300                | 100,700   | 1.6   | 82.8                      | 83.5  |
| 4    | 4    | 4    | MRB Group                      | 59,106                 | 53,571    | 10.3  | 61.3                      | 56.8  |
| 5    | 5    | 5    | Millward Brown                 | 40,300                 | 35,400    | 13.8  | 67.2                      | 66.8  |
| 6    | 6    | 6    | Information Resources Inc.     | 23,800                 | 24,300    | -2.1  | 11.5                      | 14.6  |
| 7    | 7    | 7    | Louis Harris & Associates      | 13,680                 | 13,100    | 4.4   | 60.0                      | 60.1  |
| 8    | NA   | 8    | Gallup Organization            | 4,500                  | 2,500     | NA    | 9.4                       | NA    |
| 9    | 9    | 9    | Harte-Hanks Marketing Services | 2,000                  | 2,000     | 0.0   | 11.7                      | 13.1  |
| 10   | 10   | 10   | Walker Group                   | 1,591                  | 830       | 91.6  | 4.9                       | 2.8   |
| 11   | 11   | 11   | Starch INRA Hooper             | 1,500                  | 1,300     | 15.4  | 7.1                       | 5.7   |
| 12   | 12   | 12   | BASES Group                    | 1,000                  | 900       | 11.1  | 4.4                       | 4.6   |
| 13   | 13   | 13   | Decision Research              | 980                    | 903       | 8.5   | 7.0                       | 7.0   |
| 14   | 14   | 14   | BRX Global                     | 900                    | 400       | 125.0 | 50.0                      | 36.4  |
| 15   | 15   | 15   | Wirthlin Group                 | 900                    | 1,125     | -20.0 | 9.1                       | 8.8   |
| 16   | 16   | 16   | Burke Marketing Research       | 600                    | 375       | 60.0  | 2.4                       | 1.5   |
| 17   | 17   | 17   | Pretesting Co.                 | 540                    | 561       | -3.7  | 7.6                       | 8.8   |
| 18   | 18   | 18   | Rothstein-Tauber               | 315                    | 169       | 86.7  | 10.0                      | 5.0   |
| 19   | 19   | 19   | National Analysts              | 200                    | 115       | 73.9  | 1.5                       | 0.9   |
| 20   | 20   | 20   | Mediamark Research             | 115                    | 112       | 2.7   | 0.7                       | 0.7   |
| 21   | 21   | 21   | Hamlin Harkins                 | 100                    | 100       | 0.0   | 20.0                      | 21.7  |
| 22   | 22   | 22   | Marketing Metrics              | 100                    | 0         | NA    | 11.8                      | 0.0   |
| 23   | 23   | 23   | Marketing Analysts             | 94                     | 80        | 17.5  | 1.3                       | 1.4   |
| 24   | 24   | 24   | Heller Research Group          | 65                     | 30        | 116.7 | 2.7                       | 1.5   |
| 25   | 25   | 25   | American LIVES                 | 35                     | 0         | NA    | 3.5                       | 0.0   |
| 26   | 26   | 26   | Research & Forecasts           | 15                     | 5         | 200.0 | 2.1                       | 0.4   |

Notes: Dollars are in thousands. \* indicates figures are AA estimates. 1990 figures not adjusted for 1991 acquisitions. Source: AA survey. AA chart: Kathy Welyki

## Dollars grow tight in U.S.

(Continued from Page S-1)  
1%. Better than 10% comes from a variety of sources collectively labeled "other."

Regarding the broad research categories of syndicated and custom research, nearly 74% said they were not involved in syndication. Nine percent of the respon-

dents said syndicated work accounts for 75% to 100% of their activity.

For customized research, the percentages were roughly reversed. Nearly 80% said all of their work was customized; almost 9% said custom work accounted for less than 10% of their research.

While the demand for customer satisfaction and the need for lower research costs spurred the wealth of new technologies that have brought greater growth to the industry, there's something to be said about the tried-and-true techniques—like one-on-one interviewing.

New business requiring extensive personal inter-

viewing helped Abt Associates expand revenues by 27.5% in 1991, largely from a \$35 million to \$40 million federal government contract to get at the core problems in secondary education.

Abt hired 600 people nationwide to conduct personal interviews and established a coordinating office in Chicago, staffed by an additional 60 to 70. □

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By Betsy Spethmann

**W**ith affiliations on the rise among research companies, the biggest growth area is overseas as researchers learn to speak a variety of languages.

Among respondents to *Advertising Age's* survey, nearly half the 40 companies planning affiliations this year are teaming with foreign-based researchers.

Others plan ventures with clients (25%), U.S.-based research companies (20%) and computer software developers (10%).

Of the 51 companies that already have taken on partners, most affiliations (33.3%) are with foreign-based research companies.

Affiliations include partnerships formed for the exchange of information or business, franchise agreements for services syndicated by a U.S. company and mul-

## Affiliation agreements aim mostly at foreign shores

### But conservative shops plan to go slowly

Global Marketing Research may add two to five partners in the next few years, but "we don't want to grow too much," he says. "A [smaller group] is better for clients than a loose network" with more members less familiar with each other.

The oldest international network of research companies, International Research Associates, has 32 members doing business in 70 countries and is managed by Starch INRA Hooper.

BASES Group has developed a network of 26 affili-

ates that franchise the company's new-product forecasting system. BASES in 1980 teamed with German company Infratest, which sells and manages BASES' system in Europe.

BASES prefers partners in countries with marketing en-

vironments compatible to the U.S. because its domestically generated data "makes assumptions of people's reactions" in forecasting the success of new products, says Steven Wilson, BASES Group president-chief operating officer. Countries markedly different from the U.S. would be hard to assess with BASES' current data.

"Business is growing well in Japan, and Canada is strong," Mr. Wilson says.

At least six companies that reported no international revenue or foreign-company affiliates are planning affiliations this year. □

"Expenditures are growing more in Europe than in the U.S."

tinational networks run by a research company.

"The trend of global business has affected the research marketplace," says Tom Miller, exec VP at Starch INRA Hooper. "As new parts of the world open up, such as the former Soviet Union and Eastern Europe, [and] as Western Europe consolidates, research expenditures are growing more there than in the U.S."

"Marketers are increasingly approaching their problems globally rather than splitting domestic and international," says Joel Axelrod, president of BRX/Global. "I expect international business to grow far more than domestic."

BRX is a founding partner and the U.S. member of Global Marketing Research, a 6-year-old international network of 14 companies in as many countries. Members subcontract work to each other, give guidance on cultural mores and help interpret results.

Last year, growth of BRX's international revenue was more than double that of domestic revenue, the company reports. Foreign and global work account for 40% of BRX's business.

"We're still in a growth state internationally. Many marketers don't fully recognize the significance of the international market," Mr. Axelrod says.

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# Researchers finally digesting cornucopia of scanner data

It took time but shops are starting to respond to client cry for better analysis of information

By Scott Hume

**T**he strategy now is you give away the razor," one research company executive claims, "but you charge for the blades."

The executive is describing the shift taking place in the business, a shift that has moved the focus away from data collection and into data analysis.

Now that clients have reams of data, what they need most are ways to use it. Those analytical tools are the blades.

Responses to *Advertising Age's* survey of research companies reflect this shift in focus.

Almost two out of three respondents say clients are de-

manding more tools to analyze increasing data at their disposal.

The reason for clients' increased interest in analytical help is a recent embarrassment of research riches. Among those responding to the survey, 54% agreed their clients have been "hindered by the volume of data available."

For research companies, that has meant placing more emphasis on refining and improving research services and products, and 58% say revenues from developing, testing and improving their research have increased since 1990. Only 7% have seen a decrease.

The shift has been most pronounced in consumer package goods, researchers and clients agree, although the need for new data certainly isn't exhausted.

From "the late 1980s

**"We're not hearing about overload so much now because the databases are being managed better."**

through the early 1990s, the focus was more on databases and on ways to manage [them]. Everyone was talking about 'data overload,'" says Gian Fulgoni, chairman-ceo of Information Resources Inc.

"That was most true in the package-goods area because of the explosion of information made available through scanning technology.

"But we're not hearing about overload so much now because the databases are being managed better," he says. "That's the result of the value-added analytical applications that have been developed."

Package-goods companies were out front riding the wave of the data flow not only because of scanners but "because package goods is a more researched industry overall," says Tod Johnson, president of NPD Group. "Structurally, it's easier to research, with fewer channels of distribution" than businesses such as apparel or toys or services industries.

"Those [package-goods] clients have so much to work with the emphasis there is on improving information that exists," Mr. Johnson says. "In product and concept testing, people are moving more to their own standardized systems [based on past data], so there is less need for designing systems and more emphasis on comparative and analytical tools."

The recession has helped accelerate the shift to analysis from data generation, some executives say. The pinch on profits has made clients more interested in tangible results.

"In the third and fourth

quarters last year, we noticed that senior management more and more was questioning the value of the research they're buying," says Tom Daley, president of Spectra Marketing Systems.

"What they're saying is, 'Don't just ship me a box [of data], give me data that changes how I do business, that tells me how I take my product to market.'"

"That's challenged us to go back and examine what we're selling . . . We've got to provide specifics: FSI optimization research or better prioritization solutions.

"Clients don't care what information you have," Mr. Daley continues. "They know if their market shares are up or down and what percentage of sales is on deal. What clients want to know is 'How do I use this information to talk to the trade and the consumer differently and more effectively.'"

That change is evident just in the last year, Mr. Daley says. There was a time in the quite recent past "when researchers could offer what I call the 'neat new thing' in information. No more. Now it's 'How many more units will I ship?'"

That's why the focus is on the blades, not the razor, Mr. Daley adds.

The recession also has led to a downsizing of client and agency research departments.

"But that doesn't mean there aren't holes in the data or improvements in data collection that need to be made," says Karen Randolph, senior VP-director of

consumer resources at Foote, Cone & Belding, Chicago.

It's impossible to totally separate data collection and analysis, contends Bob Warrens, senior VP-director of media research and resources, J. Walter Thompson USA, Chicago.

"It's evolutionary. Once you start using a database, you find things that could be done better or differently or information that needs to be added," he says. "At the same time, we don't want to see a whole bunch of paper." □

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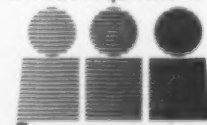
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# CONSUMER MAGAZINE AD LINAGE

| May  |  |  |  |  | Year-to-date |  |  |  |  | May  |  |  |  |  | Year-to-date |  |  |  |  | May  |  |  |  |  | Year-to-date |  |  |  |  |      |  |  |  |  |      |  |  |  |  |
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# Ad page upswing likely after three good months

By Scott Donaton

Consumer magazines have seen their first year-to-date ad page gain in three years.

Behind the gain are ad page increases for three of the first five months this year, according to Publishers Information Bureau.

Ad pages rose 5.6% in May to 14,186.5, the strongest monthly increase this year. The gain reflects a particularly weak performance last May, when ad pages fell 13.7% from the same month in 1990.

Year-to-date pages for 1992 are up 0.4% to 64,933.2, indicating a true recovery could be under way.

May saw increases in eight of the top 10 ad categories as ranked by revenues, with seven up more than 10%. Seven of the top 10 categories rose in year-to-date revenues, with only toiletries, food and tobacco still falling.

The greatest ad page increases continued to come from the largest titles. Eighteen of the top 25 magazines were up through May, with *People*, *TV Guide*, *Fortune*, *Cosmopolitan*, *Time*, *Glamour* and *Elle* still registering losses.

Of the 176 magazines tracked by PIB, about half—87—were up in pages for the period.

"In relative terms, it is getting better," said Thomas Evans, publisher of *U.S. News & World Report*. "It's not all seashells and balloons yet, but unless the econ-

omy takes another dip, I think the worst is behind us."

The 10 magazines with the biggest percentage increases are *Traditional Home*, up 128.3% to 109.7 ad pages; *Financial World*, up 77% to 460.9; *Allure*, up 70.6% to 205.9; *Golf for Women*, up 53.8% to 79.1; *American Health*, up 52.3% to 189.9; *Northwest Airlines WorldTraveler*, up 43.3% to 285.9; *Endless Vacation*, up 41.3% to 144.1; *Inc.*, up 34% to 454.2; *Movies USA*, up 33.3% to 48; and *Consumers Digest*, up 30% to 88.7.

But some titles aren't seeing recovery yet. Of the 10 magazines with the steepest percentage declines through May, *Corporate Finance*'s pages fell 56.3% to 64.4; *The Practical Homeowner* down 46.6% to 103.4; *American Heritage*, down 35.5% to 113; *Art & Antiques*, down 34.4% to 192.5; *Discover*, down 33.9% to 104.9; *Town & Country*, down 29.3% to 270.2; *Sport*, down 26.9% to 120.6; *HG*, down 25.2% to 284.1; *Suc-*

*cess*, down 23.6% to 147.8; and *Harper's Bazaar*, down 23.3% to 360.7.

The four Sunday magazines tracked by PIB showed increases through May. Among local titles, *The New York Times Magazine*'s 1,203.3 pages were up 1.4%, and the *Los Angeles Times*' Sunday magazine saw pages rise a hefty 58% to 491.2. On the national level, *Parade*'s 371.9 pages were up 21.7% and *USA Weekend*'s 325.9 pages marked a 21.9% gain.

Results are mixed in the travel field. *European Travel & Life*, which ceased publication with its May issue after an unsuccessful sale attempt, finished its journey with 155.5 pages, down 26%. *Travel & Leisure*'s 467 ad pages were down 17.3%, while *Gourmet*'s 447.8 pages fell 4.6%.

*Conde Nast Traveler* saw pages rise 7.5% to 432.1. *Travel Holiday* was flat with 237.6 pages. And *National Geographic Traveler*'s 162.1 pages rose 11.6%. □

## Top 10 magazine ad categories by revenue

| Category                  | 1992 revenue  | % chg  | 1992 pages | % chg  |
|---------------------------|---------------|--------|------------|--------|
| Automotive*               | \$422,836,412 | 14.2   | 7,395.8    | 12.32  |
| Toiletries                | \$264,367,040 | -2.66  | 5,260.8    | -8.93  |
| Direct response cos.      | \$249,022,944 | 4.27   | 7,811.4    | -1.08  |
| Business & consumer svcs. | \$185,773,195 | 21.8   | 5,079.4    | 17.94  |
| Food                      | \$183,477,419 | -0.96  | 2,606.8    | -13.49 |
| Apparel**                 | \$181,241,999 | 9.10   | 5,939.2    | -1.25  |
| Travel, hotels & resorts  | \$175,074,311 | 4.13   | 5,202.8    | -0.87  |
| Computers & office equip. | \$121,746,766 | 16.82  | 2,392.4    | 8.02   |
| Cigs                      | \$96,839,274  | 33.41  | 1,806.3    | 20.35  |
| Cigarettes & tobacco      | \$90,793,605  | -20.62 | 1,451.6    | -20.21 |

Revenue and page figures are from January-May 1992. \*Includes necessities and equipment. \*\*Includes footwear and accessories. Source: Publishers Information Bureau.

## Character developments

### NBC's lineup loses popular players; CBS may rule

By Joe Mandese

The fall TV season might be character-building for CBS.

Dramatic shifts in networks' prime-time schedules will significantly alter the ranking of viewers' favorite TV characters, with CBS replacing NBC at the top.

Many of NBC's most popular series—and their characters—will leave the network this fall, making the network third in character appeal, predicted David Poltrack, senior VP-research and planning of the CBS Broadcast Group. The projections are based on periodic research conducted by CBS.

In CBS' March 13-15 phone survey of 1,000 adult TV viewers, 49% named NBC characters as their favorites, 30% named ABC characters and 21% named CBS'.

Among NBC favorites is Cliff Huxtable, played by Bill Cosby on "The Cosby Show." He ranked No. 1, with 10% of respondents calling the character their favorite—but



Murphy Brown may replace Cliff Huxtable as TV's favorite character.

he won't be back this fall.

Other popular characters shows dropping off NBC's schedule are "Matlock" (Andy Griffith's character, Ben Matlock, is the No. 2 favorite overall, according to CBS' survey), picked up by ABC; and "The Golden Girls" and "In the Heat of the Night," both picked up by CBS.

The loss of those shows and the growing popularity of CBS characters bode well for CBS, Mr. Poltrack said.

"NBC will lose programs from its schedule that accounted for 60% of its favorite-character mentions," he said. "CBS will pick up characters from 'In the Heat of the Night' and 'The Golden Girls.' ... This net gain will move CBS from third place to first in favorite returning characters."

NBC couldn't be reached for comment.

ABC will be hurt by its loss of "Who's the Boss?" "Columbo" and "Perfect Strangers," Mr. Poltrack said.

Another factor in CBS' projected improvement are new series featuring familiar and well-liked actors, including Bob Newhart in "Bob," John Ritter and Markie Post in "Hearts Afire" and Susan Dey in "Love and War."

"Our program development efforts have been character-focused," Mr. Poltrack said. "We believe the key to a strong, enduring prime-time schedule is strong characters."

Who will succeed Cliff Huxtable as America's favorite? Four likely candidates are CBS' "Murphy Brown," NBC's Sam Malone of "Cheers" and ABC's Roseanne Connor from "Roseanne" and Tim Taylor of "Home Improvement," all named by 4% of respondents to CBS' survey.

Since the survey preceded Vice President Dan Quayle's highly publicized comments about Murphy Brown, "We believe Murphy may already have moved up to No. 1," Mr. Poltrack said. □

Joe Mandese coordinates MediaWorks.

## Magazine ad page leaders

Publishers Information Bureau figures for January through May 1992.

| Rank | Magazine                         | Pages    | % chg | Dollars       | % chg |
|------|----------------------------------|----------|-------|---------------|-------|
| 1    | Business Week                    | 1,408.55 | 11.5  | \$2,657,638   | 8.9   |
| 2    | Forbes                           | 1,325.79 | 5.2   | \$6,617,913   | 9.1   |
| 3    | Bride's & Your New Home          | 1,277.21 | 2.1   | \$4,321,774   | 5.1   |
| 4    | The Economist                    | 1,229.35 | 27.9  | \$3,707,678   | 51.1  |
| 5    | People                           | 1,151.39 | -6.2  | \$2,954,256   | 0.3   |
| 6    | Vogue                            | 1,097.02 | 0.9   | \$6,208,183   | 5.2   |
| 7    | Modern Bride                     | 1,041.81 | 3.4   | \$8,546,498   | 11.9  |
| 8    | TV Guide                         | 1,034.90 | -3.3  | \$14,787,376  | -8.9  |
| 9    | Sports Illustrated               | 915.78   | 8.0   | \$27,336,342  | 10.8  |
| 10   | Entrepreneur                     | 900.90   | 5.3   | \$11,349,714  | 22.6  |
| 11   | Bridal Guide                     | 867.92   | 21.9  | \$8,660,208   | 70.6  |
| 12   | Fortune                          | 865.36   | -3.6  | \$7,297,064   | -2.1  |
| 13   | Golf World                       | 864.42   | 13.6  | \$6,057,352   | 20.9  |
| 14   | New York Magazine                | 858.08   | 0.3   | \$15,398,489  | 4.9   |
| 15   | Newsweek                         | 811.83   | 12.0  | \$6,923,551   | 13.3  |
| 16   | Cosmopolitan                     | 786.90   | -4.9  | \$4,221,094   | 2.9   |
| 17   | Time                             | 786.65   | -3.6  | \$30,328,438  | 5.3   |
| 18   | U.S. News & World Report         | 759.47   | 9.8   | \$8,316,111   | 15.6  |
| 19   | Good Housekeeping                | 678.93   | 3.4   | \$4,824,310   | 10.9  |
| 20   | The New Yorker                   | 673.36   | 5.1   | \$19,572,004  | 7.3   |
| 21   | American Way                     | 667.24   | 11.6  | \$9,844,752   | 9.5   |
| 22   | Family Circle                    | 638.55   | 5.1   | \$9,533,123   | 13.1  |
| 23   | Glamour                          | 635.56   | -13.5 | \$7,146,375   | -5.8  |
| 24   | Golf Digest                      | 624.52   | 17.3  | \$6,275,460   | 18.7  |
| 25   | Elle                             | 623.36   | -11.8 | \$22,109,554  | -6.1  |
| 26   | Yachting                         | 621.39   | 7.0   | \$4,329,167   | 12.9  |
| 27   | Muscle & Fitness                 | 595.24   | -0.6  | \$11,343,429  | 3.8   |
| 28   | Rolling Stone                    | 584.07   | -5.2  | \$25,461,709  | 3.0   |
| 29   | Parents                          | 573.67   | 0.2   | \$26,994,124  | 5.8   |
| 30   | Woman's Day                      | 562.64   | 17.7  | \$6,371,463   | 25.7  |
| 31   | Golf Magazine                    | 550.23   | 0.8   | \$21,303,043  | 8.3   |
| 32   | Vanity Fair                      | 544.81   | 10.3  | \$23,021,399  | 31.0  |
| 33   | Ladies' Home Journal             | 542.80   | -12.9 | \$4,564,305   | -6.2  |
| 34   | Skin Diver                       | 537.87   | -10.4 | \$5,842,046   | -4.6  |
| 35   | Texas Monthly                    | 537.74   | -2.2  | \$6,831,113   | 8.1   |
| 36   | Better Homes & Gardens           | 536.56   | -1.1  | \$7,452,846   | 6.6   |
| 37   | Southern Living                  | 528.86   | 5.0   | \$11,104,141  | 16.6  |
| 38   | Popular Photography              | 525.80   | 1.1   | \$13,331,036  | 12.2  |
| 39   | Sunset                           | 521.11   | -16.6 | \$20,056,332  | 7.4   |
| 40   | GQ                               | 501.87   | -18.0 | \$15,723,855  | -5.5  |
| 41   | Money                            | 498.94   | 3.6   | \$4,924,230   | 6.3   |
| 42   | Car & Driver                     | 490.52   | -4.7  | \$21,356,845  | 5.7   |
| 43   | Architectural Digest             | 480.30   | -7.9  | \$13,746,964  | -4.9  |
| 44   | Mademoiselle                     | 473.99   | -14.9 | \$8,266,587   | -3.9  |
| 45   | Travel & Leisure                 | 466.96   | -17.3 | \$23,089,880  | -3.1  |
| 46   | Financial World                  | 460.89   | 77.0  | \$11,718,132  | 89.9  |
| 47   | Inc.                             | 454.19   | 34.0  | \$19,310,602  | 22.4  |
| 48   | Salt Water Sportsman             | 449.02   | -2.9  | \$3,117,716   | -8.2  |
| 49   | W Magazine                       | 448.00   | -2.0  | \$12,181,785  | 9.3   |
| 50   | Gourmet                          | 447.84   | -4.6  | \$13,800,090  | -1.3  |
| 51   | Road & Track                     | 445.32   | 2.3   | \$14,141,788  | 8.4   |
| 52   | Redbook                          | 437.26   | -6.1  | \$26,601,043  | -13.7 |
| 53   | Conde Nast Traveler              | 432.10   | 7.5   | \$13,381,046  | 12.1  |
| 54   | Country Living                   | 431.32   | 9.3   | \$20,434,338  | 16.3  |
| 55   | Jet                              | 422.46   | 0.4   | \$7,582,402   | 2.3   |
| 56   | McCall's                         | 420.20   | 1.7   | \$3,221,020   | 0.6   |
| 57   | Bicycling                        | 409.85   | -11.0 | \$7,422,095   | 5.3   |
| 58   | Outside Magazine                 | 402.86   | 11.6  | \$9,439,747   | 34.2  |
| 59   | Seventeen                        | 382.97   | -8.3  | \$13,124,940  | -9.5  |
| 60   | Parenting                        | 382.45   | 26.8  | \$10,301,078  | 48.8  |
| 61   | Ebony                            | 378.40   | -8.3  | \$14,783,386  | -6.3  |
| 62   | Parade                           | 371.94   | 21.7  | \$198,977,829 | 25.6  |
| 63   | Self                             | 371.59   | -7.3  | \$15,789,634  | -4.5  |
| 64   | Reader's Digest                  | 365.30   | -1.5  | \$46,128,519  | 15.6  |
| 65   | Bon Appetit                      | 363.92   | -7.0  | \$12,935,188  | 3.5   |
| 66   | Delta Sky                        | 363.16   | 10.4  | \$11,111,400  | 17.6  |
| 67   | Harper's Bazaar                  | 360.67   | -23.3 | \$10,854,778  | -20.4 |
| 68   | Black Enterprise                 | 358.26   | 14.8  | \$7,743,958   | 25.4  |
| 69   | Entertainment Weekly             | 353.36   | 11.9  | \$10,960,093  | 48.4  |
| 70   | Four Wheeler                     | 347.93   | -9.9  | \$2,871,887   | -19.1 |
| 71   | Shape Magazine                   | 344.86   | 25.9  | \$5,322,260   | 31.6  |
| 72   | Esquire                          | 341.85   | 3.0   | \$12,212,343  | 14.0  |
| 73   | Essence                          | 341.30   | 9.7   | \$10,925,972  | 26.2  |
| 74   | San Francisco Focus              | 334.39   | -0.8  | \$2,408,049   | 2.3   |
| 75   | BaseMaster                       | 333.42   | -7.6  | \$7,249,775   | -3.3  |
| 76   | Automobile Magazine              | 330.10   | 2.2   | \$8,795,174   | 3.9   |
| 77   | Metropolitan Home                | 330.07   | -8.6  | \$12,491,742  | -5.1  |
| 78   | Motor Trend                      | 329.48   | -6.1  | \$13,585,542  | -1.3  |
| 79   | USA Weekend                      | 325.91   | 21.9  | \$73,623,125  | 41.7  |
| 80   | Mirabella                        | 318.82   | -20.0 | \$9,370,561   | 14.9  |
| 81   | Smithsonian                      | 318.16   | -13.2 | \$15,432,818  | -4.8  |
| 82   | Tennis                           | 312.33   | 7.3   | \$11,354,225  | 11.4  |
| 83   | Popular Science                  | 308.19   | 4.4   | \$10,933,783  | 21.8  |
| 84   | Sports Afield                    | 305.09   | -6.8  | \$6,480,010   | -1.5  |
| 85   | New Woman                        | 304.90   | -6.2  | \$8,284,918   | -8.7  |
| 86   | House Beautiful                  | 303.58   | 0.4   | \$12,661,201  | 0.6   |
| 87   | Compute                          | 303.02   | -13.5 | \$2,665,392   | -13.9 |
| 88   | Penthouse                        | 301.24   | 2.7   | \$12,022,118  | 0.6   |
| 89   | Working Woman                    | 297.59   | -16.3 | \$10,474,146  | -9.9  |
| 90   | Omni                             | 297.35   | 5.1   | \$8,042,958   | 4.7   |
| 91   | Field & Stream                   | 296.98   | -9.3  | \$13,820,007  | -9.1  |
| 92   | Kiplinger's Personal Finance     | 294.06   | 22.4  | \$8,705,328   | 25.7  |
| 93   | Popular Mechanics                | 288.91   | -3.6  | \$11,600,400  | 7.8   |
| 94   | Northwest Airlines WorldTraveler | 285.87   | 43.3  | \$6,330,125   | 10.5  |
| 95   | HG                               | 284.13   | -25.2 | \$8,621,342   | -18.4 |
| 96   | SKI                              | 282.97   | -6.2  | \$6,064,852   | 2.1   |
| 97   | Outdoor Life                     | 281.63   | -16.3 | \$9,629,820   | -14.6 |
| 98   | Child                            | 279.07   | 25.4  | \$5,579,567   | 37.1  |
| 99   | Yankee                           | 273.69   | -6.1  | \$2,938,500   | -26.6 |
| 100  | The Atlantic                     | 272.27   | 7.0   | \$5,531,547   | 19.1  |

Percent change compares January-May in 1992 with 1991. \*National Sunday magazine, tracked separately by PIB. Source: Publishers Information Bureau.

# Record number joining hunt for Cannes Lions

CANNES—Despite a slowdown in the ad business in many countries, the number of commercials entered in the 39th International Advertising Film Festival here this week hit a record 3,809, up 0.82% from 3,778 in 1991.

Delegates are gathering in this southern French resort town to view the entries during the week-long festival and await the announcement of the winners at a gala dinner June 27.

The entries come from 44 coun-

tries, with the greatest number—770—from the U.S., followed by 331 each from Japan and the U.K. and 330 from Germany.

Other countries submitting a significant number of entries are Spain (281), Italy (254), France (210), the Netherlands (148), Australia (121), Brazil (115), Norway (105) and Sweden (103).

Countries new to the competition this year include Zimbabwe, which submitted one entry, and Slovenia, with 10 entries. Countries represented last year but absent this year include Bahrain, Cyprus, Czechoslovakia, Kenya and Venezuela.

In the print and poster competition, introduced this year, more than 2,100 entries have been submitted. Also new this year is a series of four seminars, including one on "Global Advertising," presented by Advertising Age June 24. Others are being presented by Dentsu, Saatchi & Saatchi Advertising and production house Ex-Machina June 23 to 25.

In recent years, the winner of the most Gold Lions has shifted back and forth between the U.S. and the U.K. Over the past five years, the U.K. has edged ahead, holding a total of 41 Gold Lions, followed by the U.S. with 37. Growing creativity in Spain is reflected in that country's increasing number of winning entries.

For total awards, last year's big winner was the U.K. with 20, followed by the U.S. with 14, and Spain and Australia with nine each. □

## U.K. takes most Gold Lions

Number of medals ■ 1987 ■ '88 ■ '89 ■ '90 ■ '91



Source: Screenvision/Cannes International Advertising Film Festival

## Cars

(Continued from Page 3)

Recchia, exec VP-chief operating officer at Mitsubishi Motor Sales of America. "But now they realize that high quality only gets you into the ballpark."

Mr. Recchia, who's emerged as a leading spokesman defending the Japanese import industry, expects Detroit to continue to focus on the growing patriotism.

"People are looking at domestics," he says. "In some areas of the country, it's no longer fashionable to be seen driving an import car."

The Japanese imports have been addressing the issue in different ways. American Honda Motor Co., for example, is promoting itself as a U.S. company.

"One way or the other, 'Made in America' is part of customers' perception of the difference between brands," says Gerry Rubin, president of Rubin Postner & Associates, Santa Monica, Calif., Honda's agency. "It's not a temporary issue or fad."

While the easing of the recession may expand the low end of the market, the usually insulated luxury end is becoming a more contested area. Toyota Motor Sales USA's Lexus and Nissan Motor Corp. USA's Infiniti upscale divisions continued to grow during the recession, but now the domestics and Europeans are starting to fight back in earnest.

Japanese brands surged in market share during recession-plagued 1991, picking up 1.7 share points to reach 25.7% of the combined car and light-truck market.

Most of that came at the expense of the domestic Big 3, which lost 1.1 share points, to 70.5%.

But U.S.-based automakers are winning back what they lost last year. Through the first five months of 1992, they held 72.5% of the U.S. market, up 1.7 share points from the same period a year ago. Japanese brands fell 1.3 share points to 24%, says *Automotive News*.

On average, a share point is worth about \$2 billion a year in sales, though some of the imports' share loss is mitigated by their move into higher-price territory.

**"In some areas of the country, it's no longer fashionable to be seen driving an import car."**

Domestic marketers attribute their resurgence both to improvements in their quality image and to a price advantage.

"There's been some 'Buy American' sentiment, but that hasn't been a major factor," says Jay Qualman Jr., general director of advertising for General Motors Corp.'s Buick division. Two years ago, Buick began making quality the central theme of its advertising via McCann-Erickson Worldwide, Troy, Mich.

Advertising that broke last week illustrates the tactic. The TV and print effort touts the "Best American Car Value" ranking given to the Buick Park Avenue in "The Complete Car Cost Guide," a publication by researcher IntelliChoice.

"There was a general perception among consumers that the Japanese had the low price, but that's not the case anymore," says Steve Lyons, general marketing manager at Ford Motor Co.'s Lincoln-Mercury Division.

"The Japanese are paying for their recent price increases, and add to that there's some pretty good domestic product out there," says Jim Wangers, senior managing partner of Automotive Marketing Consultants.

Consumers are "buying smartly," Mr. Wangers says, one reason why there's a big differentiation in how specific brands are doing.

On the domestic side, all the gain in market share this year is attributable to Chrysler Corp. and Ford Motor Co.

Chrysler's big gains have been on the truck side, with hot sales of its high-profit minivans and Jeep sport-utility vehicles.

Ford is trying to capitalize on its broad sales strength with new national and regional advertising from J. Walter Thompson USA, Detroit, touting the five Ford Division vehicles that are on the list of the 10 top-selling vehicles this year. The F-Series pickup is the top overall seller, while the Taurus is running a close second to the Honda Accord in car sales.

Although GM, as a whole, has lost 0.2 of a share point this year, Saturn Corp. and Pontiac Division are turning in strong performances. Saturn has gained a full point of share, to 1.4%.

Pontiac is up to 4.8%, from 4.3% in the first five months last year, led by two models redesigned for the 1992 model year, the Grand Am and Bonneville. □

# AD REVIEW

## Party aliens see the Lite, even if Miller doesn't

By Bob Garfield



Garfield

The Ad Review staff has just turned 37 years old, and what a birthday surprise was in store! Stuffed inside a new pair of trousers and lovely knit shirt: an abdomen approximately the size of Milwaukee County Stadium.

It wasn't there a year ago. It just sort of appeared, like the Perot candidacy, only with less media attention and a better navel record. But its discovery immediately resulted in a serious, dramatic, painful, self-denying

lifestyle adjustment.

A switch to light beer.

This, we are reminded, is what light beer is for: that crucial moment, that watershed, that rite of passage when a person chooses between flavor and exercise, and opts for the path less panted on. Light beer is barely beer, but it's better than Stairmaster, and that is why Miller Lite is the second best-selling brand in America.

But Miller Brewing Co. chooses to read the data differently, to attribute Lite's ranking to its beeriness rather than to its lessness, and is entirely forsaking the above-mentioned Natural Evolution of Man in favor of what it calls the "best beer" strategy. A better term would be the Pepsification of Miller Lite.

The past nine months have given us an increasingly charming and spirited series of commercials positioning Lite as the choice of a new generation, which is either wishful thinking or the proof, once and for all, that advertising is black magic capable of coaxing people to buy what they don't really want or need.

So far, with Lite volume declining, the wizardry is not apparent.

But Miller and Leo Burnett USA, Chicago, are committed to their quixotic goal, and they are tinkering with the campaign to find the elusive combination of image and sell. The latest incarnation—minus the "It's it and that's that" tagline—is an ultraproducted vignette in which an eerie, rural calm is turned into a rock 'n' roll commotion by restless aliens looking for a beer party.

In 30- and 60-second versions directed by Joe Pytko, cans of cold Lite go flying mysteriously from a farm refrigerator to a wheat field, where dozens of phosphorescent extraterrestrials boogie down to the Lite theme, "I like it like that." (They look awfully young. What's the drinking age on the Planet Eflown-hoJ?)

Then, after the now-conventional burst of static, a TV "news" clip cuts in with the kicker: a reporter at the site of "another unexplained crop formation," which, of course, is the Lite logo carved into the wheat field.

"It's a universal truth," says the voice-over. "Miller Lite's brewed from the start to be the one great-tasting beer that's less filling. It's everything you want a beer to be."

The dancing aliens make this a reasonably funny and entertaining spot, considering the hackneyed "Close Encounters" premise, the clumsy interjection of the bogus-looking "news" spot, the bad matting job on the flying cans and the generally awkward pacing. The music is buoyant and catchy, and the spot—like its recent predecessors—is apt to give the brand a more inviting, contemporary image.

But of what? Resting the annoying slogan and being youthful and burying a "less filling" in the voice-over copy all beg the central question of why anybody would buy the stuff if they don't have to. What good is a brand image without a brand purpose?

Maybe Miller and Burnett didn't want to depict, say, a suddenly paunchy birthday boy shuffling around to "I'm Beginning to See the Light," but if they wanted to just tinker, they were quite close to the heart of the matter with the tagline they dropped. Here's why to drink the stuff: "It's fat and that's it." □

Rating: ★ ★



Miller Brewing Co. uses a close encounter of the light kind in its latest attempt to sell young people Lite beer.